

Use this guide with EQIC's [Unit-based patient safety and quality improvement toolkit](#) to keep your quality improvement projects organized and on task and produce meaningful outcomes.

### **I. Pre-initiative work before involving staff**

- Review data to understand preliminary opportunities for improvement.
  - If data are not currently being collected, pursue data reports and analysis first.
- Discuss organizational priorities with leadership to align efforts.
- Gather leadership input on system and organizational readiness and resource commitment.

### **II. Pre-staff meeting work**

- Think about how to create a safe environment for staff sharing (no fear of repercussion or blame).
- Determine what you would like to accomplish at this initial meeting.
- Set specific goals and timelines for the project's initial steps.

### **III. Seek frontline input**

- Ensure a safe environment for staff sharing.
- Actively listen.
- Brainstorm systematic and technology-based solutions.
- Seek feedback about system and organizational readiness.

### **IV. Ask probing questions to encourage participation of all unit members and broader perspectives**

- When was the last event?
- What caused the event?
- What interventions to address the event have been successful?
- What has been tried but did not work?
- What data have been shared with unit staff?
- How can leadership help ensure the next initiative is successful?

### V. Reflection and evaluation from frontline staff input

- Review specific improvement opportunities identified.
- Synthesize feasible opportunities based on frontline and leadership feedback.

### VI. Reconvene frontline staff

- Seek further input on which project(s) to pursue.
- Take feedback to leadership for buy-in and support.

### VII. Project planning

- Develop SMART goals (specific, measurable, achievable, relevant and time-bound).
- Build out a project plan and timeline.
- Seek volunteer champions.
- Use high-reliability principles to reinforce improvement.

### VIII. Maintaining and sustaining projects

- Refer to the project plan schedule to keep milestones and timelines on target.
- Continue regularly scheduled meetings for frontline staff and leadership to share successes and opportunities and to pivot when necessary.
- Evaluate project measures and data for successes and opportunities.
- Determine if projects can be replicated or scaled.
- Continue the improvement cycle as needed.

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